

Create a New Offer

SUMMARY

The New Offer feature is used to create a copy of an existing transaction. This feature is most useful when a pending offer on a listing has fallen through (or was cancelled/terminated for any reason) and there's now a new offer on the same listing. This feature is also useful when a deal has fallen through and you now need to track new activity on the deal isolated from the fallen-through transaction.

IN THIS ARTICLE

- [How Creating a New Offer Works](#)
- [Create a New Offer](#)
- [Carry Over Checklists to New Offers](#)
- [More About New Offers](#)
- [Pipeline Pro Webinar Recording: New Offer](#)

How Creating a New Offer Works

The following data is copied from the original transaction to the new offer:

- All listing agents
- All docs (except sale docs and buyer docs)
- All checklist tasks except selling agent tasks (optionally)
- All notes (optionally)

Create a New Offer

- 1 Open the transaction and choose [New Offer] from the left menu.
- 2 If you'd like the notes from the original transaction to be copied over to the new offer, check the checkbox for carrying over notes. If you don't want the notes copied, leave it unchecked.
- 3 Click the [Create Offer] button to create your new offer.


New Offer for 64838 Main Street

New Offer Information

Transaction Name
64838 Main Street (#2)

Copy over all checklist tasks (except those assigned to selling agents)

Copy over all notes to the new transaction

 **Don't see the *New Offer* option on a transaction?** The *New Offer* option only appears on transactions when:

1. The transaction is in a *Pending* status or beyond (*Other, Closed, Fell Through, Auto Expiry*). [Learn more about Transaction Statuses](#) →
2. Your office has enabled the *New Offer* feature. [Learn how to Enable New Offer](#) →

Carry Over Checklists to New Offers

When creating a new offer, you can choose whether you'd like checklists to be copied over. Note that checklist tasks visible only to selling agents will never be carried over.

 :28

More About New Offers

- The new offer option is available to admins and agents who have the “create transaction” permission.
- All new offers are linked in the "Original Offer" box of the original transaction.
- The first 5 new offers on a transaction do not count against your monthly quota. All subsequent new offers related to the transaction will be counted against your quota.
- The New Offer feature is most appropriate for managing multiple offers on a listing. However, this feature may be used in other situations where you need a copy of a transaction.

Paperless pipeline Pro Webinar - New Offer

This Pipeline Pro webinar covers the New Offer feature: How it works, when to use it, and all its wonderful perks.

🕒 10:26

[View more Pipeline Pro Webinars here →](#)